

## Outlook Calendar Instructions

### April 2014

#### **Master Calendar – when to invite and when not to!**

- **Invite:** When a **vr.vc** resource is included in the meeting/activity, i.e. **vr.vcsoconference** room (“vc” in name).
- **Don’t Invite:** if a conference room that is **not** a video site is included in the meeting, i.e. **vr.sosmallworkroom** (no “vc” in name)
- **Don’t Invite:** if other resources, i.e. state cars are invited or reserved

#### **Recurring Meetings/activities**

- Recurring meetings/activities (staff meetings for example) must have an end date no longer than 1 year from start date. Each year recurring meetings will need to redone. The end date option is located under the Recurrence Button in the Toolbar under Meeting under Appointment and then under Custom. You can either select end date or number of occurrences.
- When creating a recurring meeting/activity on a conference room calendar, you must look ahead on the calendar to make sure that each day included in this activity is available for this recurring activity.
- If you need to edit a single occurrence of a recurring event, delete the single occurrence and create a new meeting/activity. Outlook does not send updates/changes to the single occurrence to the server and therefore other staff will not see updates/changes made to that occurrence.

#### **Creator of meetings/activities**

- If you are creating a meeting/activity on a calendar that is not your own you must enter either your name or your initials in the “message” section of the meeting.

- Whoever creates the meeting/activity is responsible for making sure all resources accepted the proposal.

## Miscellaneous

- **Resources** (conference rooms, video equipment, state cars) must be invited to the meeting/activity in the “To” field. If they are only included in the “Location” or “Where” field they are not invited to the meeting/activity and therefore not reserved.
- **All Day vs. Start – End times** on events: Activities/meetings marked as “all day” only appear as a Banner and does not block availability. **Do Not** use “all day” for any meetings or events that will render you unavailable.
- **Multiple day events**, i.e. vacation, planned sick leave, etc. must be created as separate daily events using the start and stop time you will be unavailable.
- **Permissions and Delegates.** These are set using the “Open Calendar” and “Permissions” buttons on your Outlook under the “Home” Tab.
- **Permissions:** Editor vs. Author vs. Reviewer. Editor Permission gives staff the ability to create/edit meetings/activities on your calendar. Review Permission allows staff to view your calendar. Do not use Author Permission. You set the Permission Level for Editor or Review once you have added a new staff person or by selecting a staff person from your list but changing it under the “Permission Level” list. **Do Not** make any changes to the Read, Write, Delete Items or Other boxes on this screen.
- **Blocked time staff reserved for client appointments.** If you have the ability to update a staff person’s calendar for an appointment on days they have blocked for appointments do not update the block. Instead create a new meeting for the appointment that will display next the to blocked time. This will update the individual’s calendar and allow all those who can see and create on that staff person’s calendar to see the

appointment. Editing and updating in the “block” does not update so that everyone can see that update.

- If you are creating a meeting/activity on a calendar that is not your own you must enter either your name or your initials in the “message” section of the meeting.
- Whoever creates the meeting/activity is responsible for making sure all resources accepted the proposal.